

## NEW BENEFIT: FINANCIAL WELLNESS SERVICES

ONE-ON-ONE COACHING | EDUCATIONAL WORKSHOPS | MANAGED ADVICE

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As part of the Radiology Partners retirement program offered by Creative Planning, you now have access to a range of financial education and advice services. Immediately you can work with a dedicated Financial Wellness Consultant who can help you develop a personalized approach to achieving your financial goals.

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### YOUR DEDICATED FINANCIAL WELLNESS CONSULTANT

Carl Barton, CFP® has more than 30 of experience helping individuals improve their financial health. The following services are free & confidential.

- ◆ Am I on-track for retirement? How much should I save?
- ◆ Tax efficient investing?
- ◆ Estate and Tax Strategies
- ◆ Do I have the right insurance coverage?
- ◆ Student loan strategies
- ◆ How should I invest?



To book a confidential appointment, scan the QR code or email [Carl.Barton@creativeplanning.com](mailto:Carl.Barton@creativeplanning.com)

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